OSC HR/Payroll Training

**Organizational Management Overview
OM200 - VC**

Slide 1

Notes

Welcome to the OSC HR/Payroll *Organizational Management Overview* training. The Organizational Management (OM) module is used to define and maintain org units, job classes, positions, and persons occupying positions. It is based on a concept of creating and linking objects. This in turn establishes relationships and inheritance of attributes.

This virtual class is taught in two sessions: A and B. Based on the pace of the class, the instructor will determine a logical place to conclude session A (which may or may not be at the end of a lesson.

Welcome and Introductions

Welcome to the *Organizational Management Overview* course.

- Introductions
- Breaks
- Parking Lot
- Virtual Classroom etiquette
  - Mute telephone
  - Cell phone off

Slide 2

Notes

The course introduction is an opportunity to get to know the others who are attending class as well as to agree on classroom courtesy. There will be at least one break during this session.
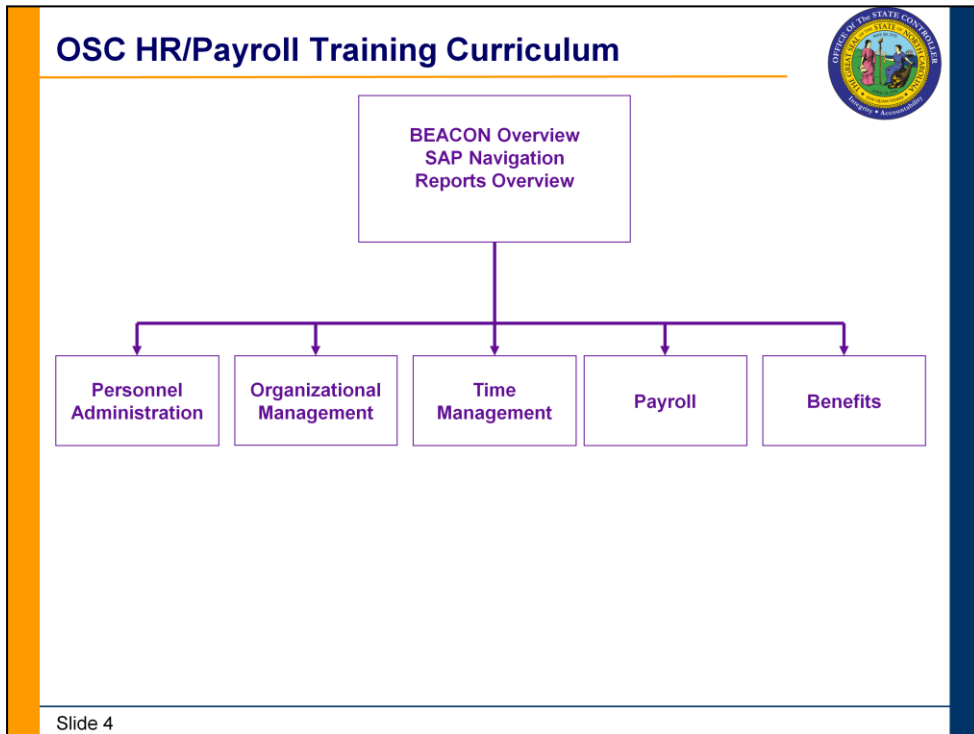
Prerequisites

- Pre-requisites
    - BEACON Overview, BC100
    - SAP Basic Navigation, BC110
    - Personnel Administration Overview, PA200
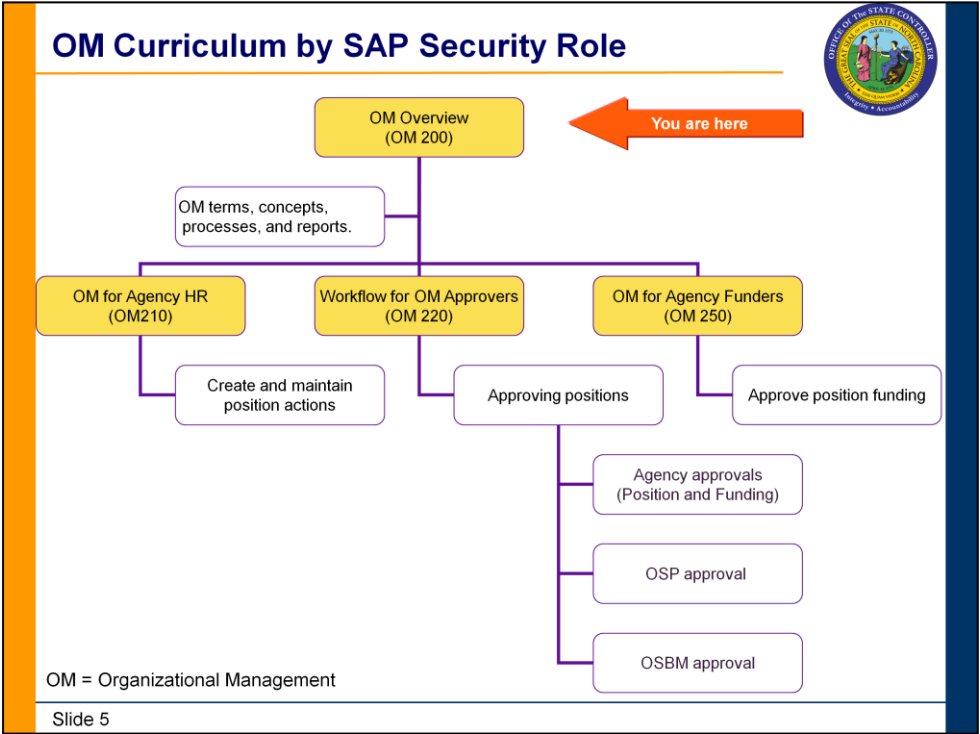   - Virtual Class Navigation, VC101

Slide 3

Notes

There are four pre-requisites that you must take before attending this class. Attending these pre-requisites ensures that you are adequately prepared to learn the new processes, concepts, terms and data entry skills that are covered in this course.

OSC HR/Payroll Training Curriculum

BEACON Overview
SAP Navigation
Reports Overview

| Personnel Administration | Organizational Management | Time Management | Payroll | Benefits |

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Notes

The OSC HR/ Payroll training program comprises several courses and different modules. Based on your HR role, you will attend courses in the Organizational Management module.

OM Curriculum by SAP Security Role

OM Overview (OM 200)

You are here

OM terms, concepts, processes, and reports.

OM for Agency HR (OM210) — Create and maintain position actions

Workflow for OM Approvers (OM 220) — Approving positions
- Agency approvals (Position and Funding)
- OSP approval
- OSBM approval

OM for Agency Funders (OM 250) — Approve position funding

OM = Organizational Management

Slide 5

Notes

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Course Map – Organizational Management Overview

Lesson 1: PA Overview

Lesson 2: OM Concepts

Lesson 3: Displaying the Organizational Structure

Lesson 4: OM Processes and Reports

Lesson 5: Course Review

Slide 6

Notes

Strategy for Training

- **Tell me** — **Concepts**
  Instructor will discuss the process, responsibilities, and describe the transactions – LISTEN

- **Show me** — **Demonstrations**
  Instructor will demonstrate job-related tasks performed in SAP – HANDS OFF

- **Let me** — **Exercises**
  Student will complete the exercises which allows for hands-on practice in class – HANDS ON

- **Support me** — **Availability**
  Instructor will be available to answer questions while the students complete the exercises.

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Notes

The *Organizational Management Overview Student Guide* provides a copy of the PowerPoint presentation used in the classroom training. Observe that space is available for you to write notes. You can use the guide as a reference when you return to the workplace. For example, you can use the exercises for practicing in the SAP training environment.

Reference materials

- Student Guide
- Job Aids
- Other resources
  - Online help
    - Provides step-by-step procedures by screen
    - Includes links to complete step-by-step procedures
  - Work instructions

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Notes

Course Objectives

Upon completion of this course, you should be able to:

- Define Organizational Management (OM)
- Identify components of the OM structure
- Display an organizational structure in SAP
- Identify OM reports

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Notes

This course is intended to give HR professionals an understanding of SAP's Organizational Management module. This course will provide you with demonstration and practice for displaying the organizational and staff assignment structure.

Course Map – Organizational Management Overview

Lesson 1: PA Overview

Lesson 2: OM Concepts

Lesson 3: Displaying the Organizational Structure

Lesson 4: OM Processes and Reports

Lesson 5: Course Review

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Notes

Lesson 1 Objectives

Upon completion of this lesson you should be able to define key Personnel Administration (PA) concepts.

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Notes

This course is designed to provide you with general knowledge about Personnel Administration and how to display data.

SAP's Foundational Structures

Display Organizational Assignment (0001)

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Notes

Before we explain in more detail the purpose, attributes, and relationships of each OM object, it is important to review SAP's foundation data structure for employee master data which is comprised of the **Enterprise Structure**, and the **Personnel Structure**. This structure is displayed on the *Organizational Assignment* (0001) infotype. The above slide shows the Organizational Assignment infotype for Patsy Alvarado, a sample employee. Let's take a look at each of the data fields within these two structures.

NOTE: We will review the organizational plan in the next lesson.

Notes

The Enterprise structure defines the legal structure of the State of North Carolina and is comprised of:

- Company Code
- Personnel Areas
- Personnel Sub-Areas
- Cost Center
- Business Area
- Fund
- Functional Area

Notes

A **Company Code** is an HR integration point with SAP financial accounting applications and is an integral part of an employee's HR record through the connection with Personnel Administration. The Company Code represents the highest levels of the organizational structure. The State of North Carolina uses two company codes: NC01 and NC02. All agencies, except Transportation and Employment Security Commission, use NC01.

NC01 – State of North Carolina - NCAS

NC01 represents primary government agencies and component units which use NCAS (North Carolina Accounting System) as their main accounting system. Until NCAS is replaced, payroll financial postings from company code NC01 will be interfaced to NCAS.

NC02 – State of North Carolina – DOT & ESC

NC02 represents any primary government agency or component unit that does *not* use NCAS as its primary accounting system, but is included in the HR/Payroll project for processing payroll transactions. These agencies or component units have their own accounting system and chart of accounts, and require payroll entries to be interfaced to their accounting systems.

Personnel Area

- Designates specific agency for Payroll

- Related to Company Code

- Assigned at the position level and defaults to the employee's record

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Notes

The **Personnel Area** is tied directly to the Company Code and is used by Payroll to identify the specific agency for whom the employee works. A Company Code can include one or more Personnel Areas. Personnel Area is important for selecting dates for reporting. Personnel areas determine where wages and salaries are posted and from where they are paid. Some examples are:

Company Code NC01

- 1401 State Controller
- 1601 Environmental and Natural Sciences
- Z101 State Personnel
- 8701 School of Science and Math

Company Code NC02

- 1501 Transportation
- 4401 Employment Security Commission

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Notes

Subarea – Personnel Subarea

The **Personnel Subarea** further defines the Personnel Area. The Personnel Subarea is identified by a four alpha-numeric code and has been designed to identify various working schedules so that Time Management can define groups of specific time entry rules (for example, 7-day schedule; 24/7 etc.) Personnel subarea groups similar jobs to conform to time and attendance rules. There are five key elements that determine an employee's Personnel Subarea assignment:

- Calendar assignment
- Relationship to the state (regular vs. temp vs. elected vs. contractor)
- Quota accrual rules/requirements
- Work schedule rule (to restrict the available work schedules)
- Working period (which defines Overtime period)

See the *Personnel Area and Subarea* (PSA) Job Aid for detailed information concerning the relevant PSAs associated with each Personnel Area. Job Aids are accessible online at the BEACON University website:

www.BEACON.nc.gov/training/index.html

Notes

The **Cost Center, Fund, and Functional Area** fields default from the Organizational Unit and therefore are grayed out. There is only one Functional Area for the whole *State*. There is only one default Cost Center and one default Fund per *Agency*. Neither the Fund nor the Functional Area are associated with the position.

A **Business Area** is a unit within a company code used by Finance. The Business Area is the lowest level at which a complete set of income statements and balance sheets can be processed. The Business Area represents a separate area of operations or responsibilities within an organization.

In most cases, the Business Area represents an Agency. The exceptions are:

- Justice (SBI)
- HHS (403-b)
- CCPS (Highway Patrol)

The Personnel structure is comprised of:

- Employee Group
- Employee Subgroup
- Payroll Area

Notes

Notes

In addition to identifying the employment status and the employee's relationship to the State, the **Employee Group** also establishes business rules for calculating leave and personnel calculation rules for managing employee pay. This also provides for benefit eligibility determination in concert with further use in alternative reporting combinations. The table below illustrates just a few examples of the State of North Carolina Employee Groups.

- A – SPA Employee (subject to State Personnel Act)

- B – SPA Law Enforcement (subject to State Personnel Act)

- K – EPA Employees (Exempt from State Personnel Act)

- O – Supplemental Staff (temporaries, pick up firefighter, National guard, contractor, etc.)

See the *Employee Groups and Subgroups* Job Aid for detailed information concerning the Employee Group field values.

Employee Subgroup

- Defines employee work status (full time, part time) and the work schedule

- Determines detailed and specific calculation rules for employee pay

- Defines subject or not subject to FLSA Overtime (OT)

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Notes

The **Employee Subgroup** defines whether the employee is subject or not subject to the Fair Labor Standards Act (FLSA) overtime, and full-time/part-time status. It is also used to determine other types of Personnel Calculation Rules specific to the combination of groups and sub-groups. The employee subgroup for the Personnel Calculation Rule allows payroll to define different payroll procedures for different employee subgroups. Some examples are:

- A1   FTN-FLSAOT Perm [Full Time Not (subject to) – FLSA Overtime – Permanent]

- B1   FTS-FLSAOT Perm [Full time Subject (to) – FLSA Overtime – Permanent]

- Y8   PTS-FLSAOT Trne [Part-time Subject (to) – FLSA Overtime –Trainee]
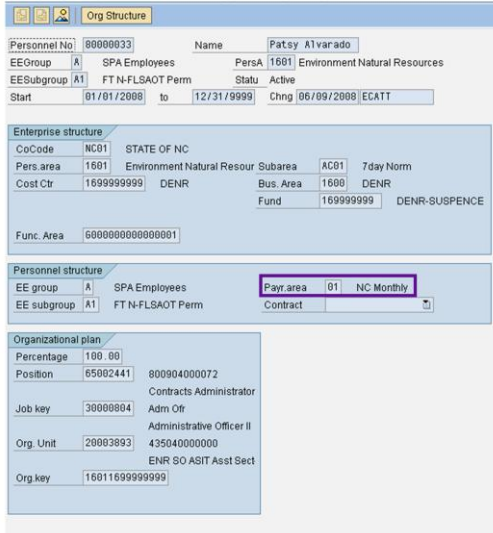
The employee groups and subgroups are the same as those used in PMIS; however, they are organized very differently. There are many combinations of Employee Groups and Subgroups in SAP. If the incorrect Employee Group and Subgroup are entered, it impacts time, work against, dual employment, benefits, and pay. As discussed in PA200, you can continue to see why accuracy is so critical when data is entered.

See the *Employee Groups and Subgroups* Job Aid for details concerning the various groups and subgroup combinations.

Notes

The payroll area determines payroll cycle. Payroll accounting is performed for each payroll area.

SAP uses payroll areas to group together employees from whom payroll is run at the same time, and also to set the dates for the payroll period.

All temporary positions are in the biweekly cycle!

Knowledge Check Poll #1

– Use the Polling section of your computer to answer the questions

Polling

Time elapsed: 0:23   Time limit: 5:00
Poll Questions:

1. Select the phrase in each question below that describes the relationship between the two objects:

2. person to position
   - a. manages
   - b. is assigned to
   - c. may be designated as
   - d. describes
   - e. holds

Submit

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Notes

1. The Employee Subgroup arranges employees by their appointment type and establishes the business rules for calculating leave.
   - a. True
   - b. False

2. The Employee Group defines more detailed and specific processing for payroll calculation rules. For example, if the employee is subject or not subject to FLSA.
   - a. True
   - b. False

3. The Payroll Area describes the pay frequency and payroll cycle for each employee.
   - a. True
   - b. False

4. The Company Code is the highest level of the organizational structure as defined by Finance.
   - a. True
   - b. False

5. The Personnel Area further defines employees in order to identify various working schedules so that Time Management can define groups of specific time entry rules.
   - a. True
   - b. False

6. The Personnel Subarea is used to identify the specific agency for whom the employee works.
   - a. True
   - b. False

Lesson Review

In this lesson, you learned to identify and define basic SAP Personnel Administration (PA) concepts.

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Notes

Course Map – Organizational Management Overview

Lesson 1: PA Overview

Lesson 2: OM Concepts

Lesson 3: Displaying the Organizational Structure

Lesson 4: OM Processes and Reports

Lesson 5: Course Review

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Notes

Lesson 2 objectives

Upon completing this lesson, you should be able to:

- Define key concepts of Organizational Management (OM)
- Define key terms related to OM
- Identify components of the OM Structure
- Describe the difference between a job and a position

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Notes

OM200 VC - Organizational Management Overview
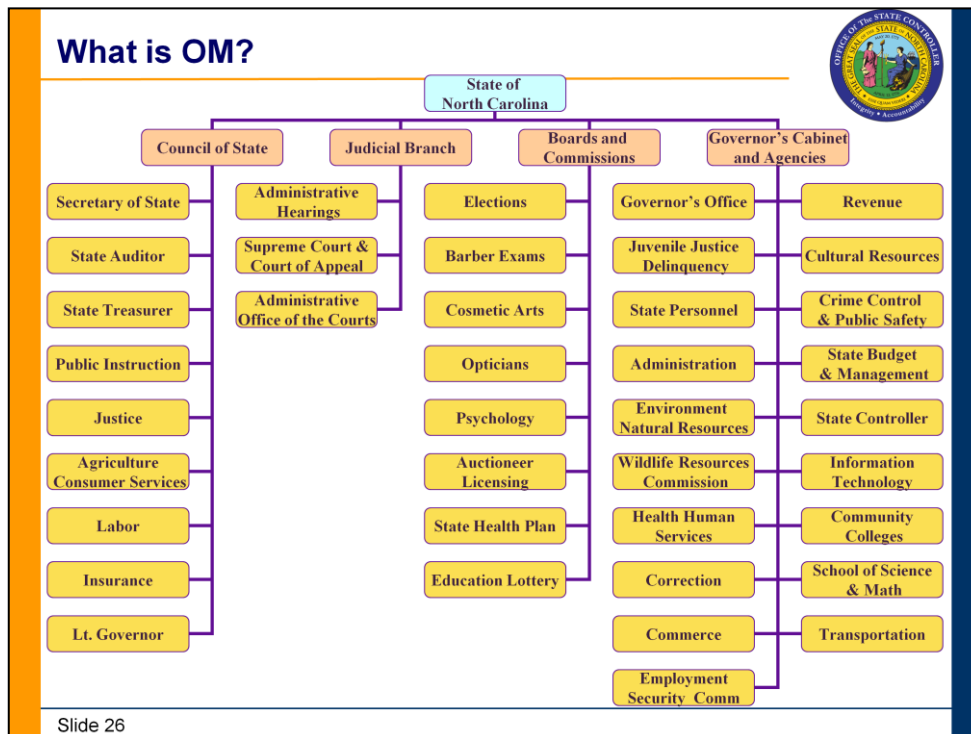
Notes

OM is a component within the HR Module that maintains a model of the State of North Carolina's organizational structure. The OM module provides a clear picture of the organization at any point in time: past, present or future. This information allows an organization to be proactive in planning for future human resource needs.

- OM is used to set up organizational and reporting hierarchy.
- OM uses relationships to manage the display of data.
- OM is used to construct and maintain an enterprise organizational chart.
- OM groups employees by function / business unit / geographical area.
- OM defines the cost distribution and salary for each position.

NOTE: OM actions/changes relate to PD118 actions in PMIS.

Organizational Management Objects

OM

Job (Class)

DESCRIBES

Position

CONTAINS

Organization Unit

PA

HOLDS

Person

Slide 27
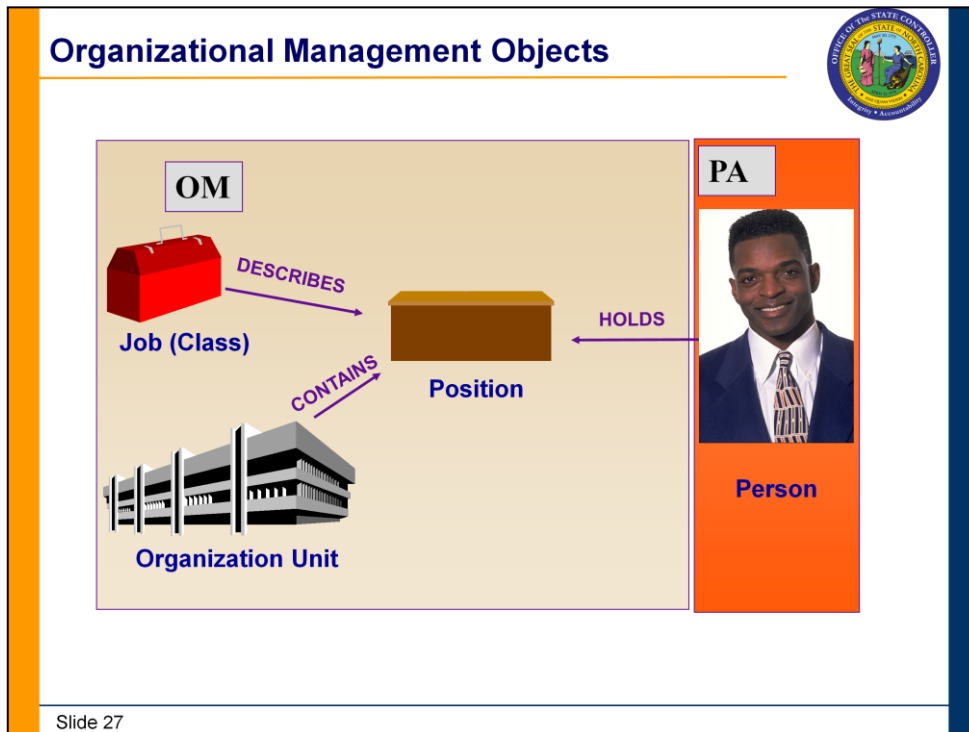
Personnel Administration (PA) is the module that contains all of the information about the employee (person). The Organizational Management module contains information about the organizational structure, like jobs, org units and positions and links to PA data.

Notes

Organizational Management is based on the concept that each element in an organization represents a stand-alone **object** with individual attributes. These objects are created and maintained separately, then linked together through **relationships**.

The primary objects that comprise an organizational hierarchy are:

- Organizational Unit (org unit)
- Job
- Position
- Persons
- Cost Centers

The organizational structure displays the org units, positions and persons as illustrated above. Jobs and Cost Centers can be found by drilling down into other objects.

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The SAP code for an org unit is "O".

An Organizational Unit (org unit) is the functional unit of the State of North Carolina (or any organization). An org unit can be the State of North Carolina, agencies/departments, divisions, sections, branches, work groups, or units throughout the organization.

An org unit number is eight digits long and begins with a "2".

Org units are linked together to represent the organization charts.

An unlimited number of org units can be created within an organizational plan.

Relationships between org units are identified to determine the hierarchy within the organizational structure.

Org units are defined by agency/department and maintained by OM Administrator at BEST Shared Services.

Typical relationships in SAP

An org unit *reports to* another org unit; is *assigned* a cost center; is a *line supervisor of* another org unit; *incorporates* a position; is *managed by* a position and may have several other relationships pertaining to Workflow approval.

Job versus Position

Job (C)	Position (S)
• Defines general classification of functions and duties that are identical across the State	• Represents specific tasks performed by a person
• Has a one to many ratio to positions	• Has a many to one ratio to jobs
• Defines EEO, Job Group, and Census Codes	• Belongs to an Organizational Unit
• Is not held by a person	• Inherits attributes from the job and organizational unit
• Is the basis for creating positions	• Is held by a person
• Is maintained by BEST Shared Services	• May be classified as Chief position
	• Is maintained by the agency and BEST Shared Services

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Notes

A **job** is the foundation from which positions are created and is designated by the letter (C) in SAP. A job is a general *classification* of duties and attributes. Typical attributes are: function, job family, FLSA status, compensation and role. One job can be used to create many positions. A job is identified by a unique number. When you hear the term *class* or *classification* you will immediately know that a job is being referenced. Of course, the converse is also true—when you hear job, you will know it is a *class*.

A **position** (represented by (S) inherits the general classification of duties and attributes from the job. However, additional specific tasks and duties are added to the position. Many positions can be created from only one job. Each position has its own unique number as an identifier assigned sequentially; therefore, there is no logic to the number assignment..

In OSC HR/Payroll, you can see both the job (class) and the position title for an employee.

Typical relationships in SAP

A job *describes* a position and *belongs to* a job branch; a position *is described* by a job. A position *is held* by a person and *belongs to* an org unit. In addition, a position *reports to* a position and may be the *line supervisor of* a position.

Chief Position
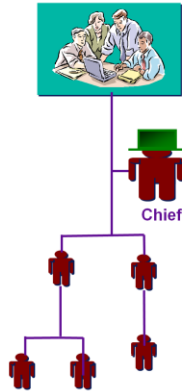
- Manages the org unit and any subordinate org units
- One Chief per org unit
- Can be the Chief of multiple org units

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Notes

Some positions are designated as chief positions to indicate span of control.

A chief position manages an org unit.

Example: Job versus Position

Job:
Engineer II

Position:
District Engineer

Position:
Environmental Engineer

Position:
Water Quality Engineer

Slide 32
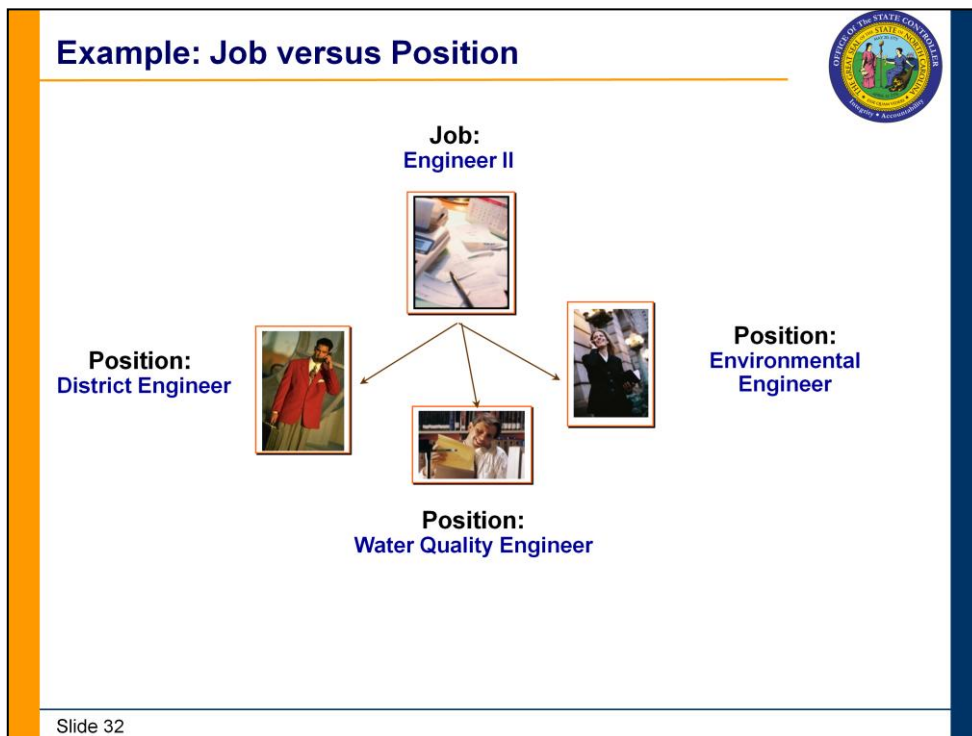
An example of a Job (class) and its related positions is engineering. There may be several different types of engineers in the organization. Each engineer position has its own specific tasks and duties; however, some general information is common to all engineer positions. That general information is created in the job and then used as a template to create the various engineer positions. The specific information pertinent to each engineer position is then added at the position level.

The relationship between jobs and positions is the same in both graded and banded jobs and positions.

Official Job (Class) Title	Position (Working) Title
• Engineer (graded)	• Water Quality Engineer • Air Quality Engineer • Building Systems Engineer • County Maintenance Engineer • Elevator Engineer • Environmental Engineer
• Forestry Technician (banded)	• County Ranger • Nursery Technician • District Ranger

Person (P)

- A person is assigned to a position.
- A person inherits the attributes of all related OM objects.
- Personnel data is created and maintained via Personnel Administration by
    - Agency HR
    - Employee Self-Service
    - Manager Self-Service
    - BEST Shared Services
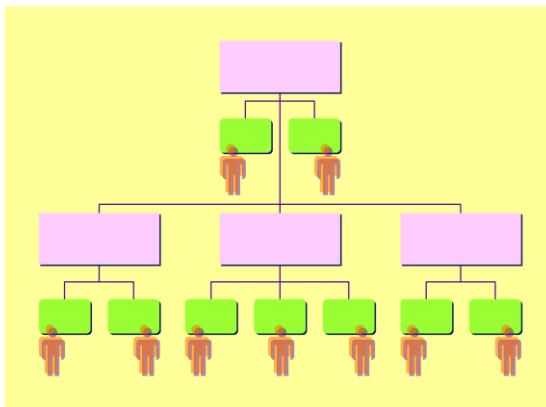
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Notes

The SAP code for a person is "P".

Persons represent employees and are the central object in the Personnel Administration module. The object Person refers to the physical person who fills a given position.

Typical SAP Relationships

A person *holds* a position.

Summary of OM Relationships

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Notes
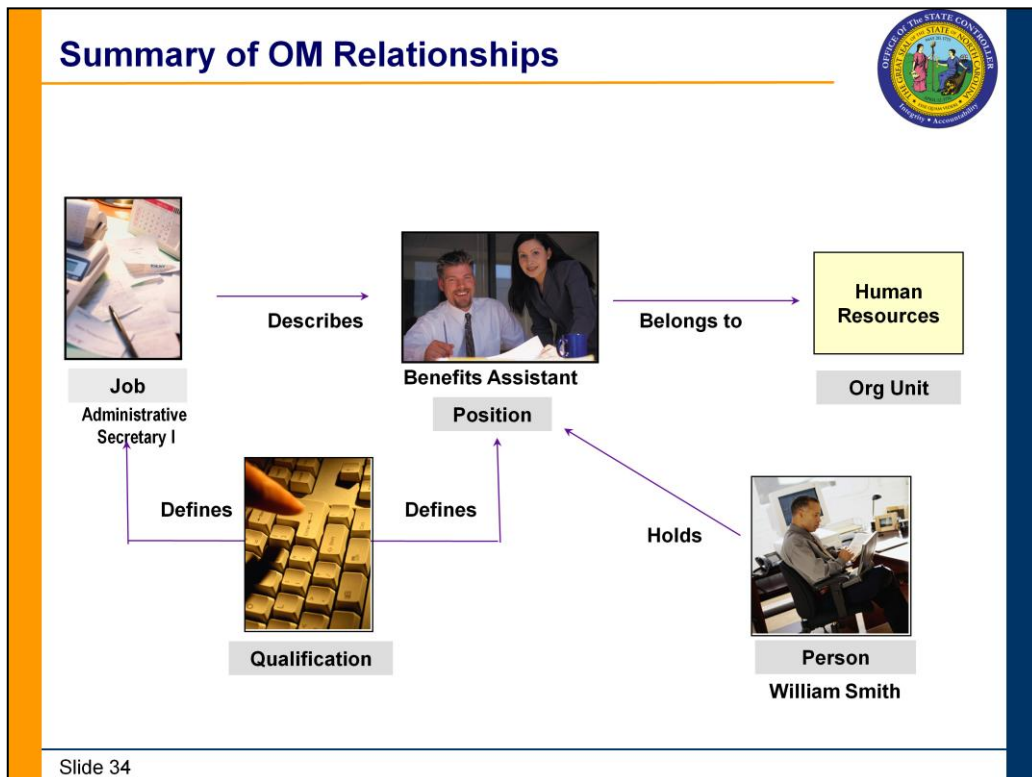
As indicated earlier, Organizational Management is based on the concept that each element in an organization represents a stand-alone object that is then linked together through *relationships*, such as those indicated above, to form a network which has the flexibility to handle human resources needs.

NOTE: The Qualifications object is currently not being used.

Relationship summary

A org unit:

> *belongs to* an org unit (O)
> *is assigned* a cost center (K)
> *is line supervisor of* an org unit (O)
> *incorporates* a position (S)
> *is managed by* a position (S)
> may have several Workflow approval relationships

A position

> *reports (line) to* a position (S)
> *belongs to* an org unit (O)
> *is described by* a job (C)
> *has a holder* – person (P)

A job:

> *describes* a position (S)
> *belongs to* a job branch

Notes

In the first lesson, the Enterprise and Personnel structures were reviewed. Thus far in this lesson, the purpose of each OM object was explained.

It is now time to focus on the Organizational plan that is displayed on the *Organizational Assignment* (0001) infotype of an employee's master data record. The above slide shows the Organizational Assignment infotype for Patsy Alvarado, a sample employee. Each data field within the organizational plan will be reviewed.

Organizational Plan

Organizational plan

Percentage	100.00	
Position	65002441	800904000072
		Contracts Administrator
Job key	30000804	Adm Ofr
		Administrative Officer II
Org. Unit	20003893	435040000000
		ENR SO ASIT Asst Sect
Org.key	16011699999999	

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Notes

The Organizational Plan defines the hierarchical relationship between organizational management objects including org units, positions and jobs.

The **Percentage** will always be 100% and identifies that the employee is working 100% of what he or she was offered and accepted. For example, if an employee accepted a full time position at $48,000, that employee's percentage will be 100%. By the same token, if a position is going to be shared, with two employees each working 20 hours at $20,000, each of those employee's percentage will also be 100% (because each employee is working 100% of what was offered and accepted, which is a 20 hour work week at $20k).

The **Position** displays the Position (working) title.

The **Job key** represents the Job (class) defined by OSP.

The **Org Unit** represents the agency/department to which the position is assigned.

The **Org key** is a randomly assigned system-generated number.

Employee's Perspective

What task do I perform?

State

Agency HR   BEST SS

Organizational Plan

Who is my financial owner?

Company = State of North Carolina 1

Enterprise Structure

What type of employee am I?

EE Subgroup = FTN-FLSAOT Perm

Employee Group = SPA Employees

Personnel Subarea = 7-day Norm

Personnel Structure

Person

What is my agency/ department?

Personnel Area = DENR

Enterprise Structure

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Notes

In summary, this slide shows how an employee is related to SAP's Foundation Structures.

Knowledge Check #2

– Use your Student Guide to answer the questions

Slide 38
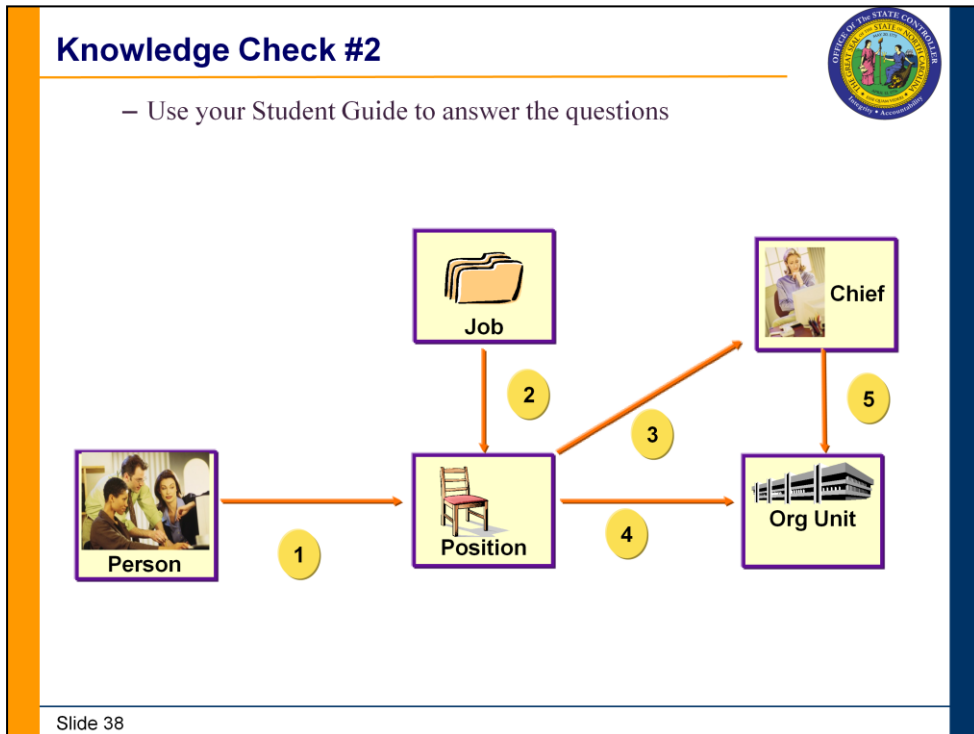
Notes

Map each of the following relationship phrases to the correct "to" and "from" arrow:

- Manages
- Is assigned (belongs) to
- May be designated as
- Describes
- Holds

NOTE: The lines are numbered to help the instructor determine if your responses are correct.

Course Map – Organizational Management Overview

Lesson 1: PA Overview

Lesson 2: OM Concepts

Lesson 3: Displaying the Organizational Structure

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Lesson 5: Course Review

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Notes

Lesson Objectives
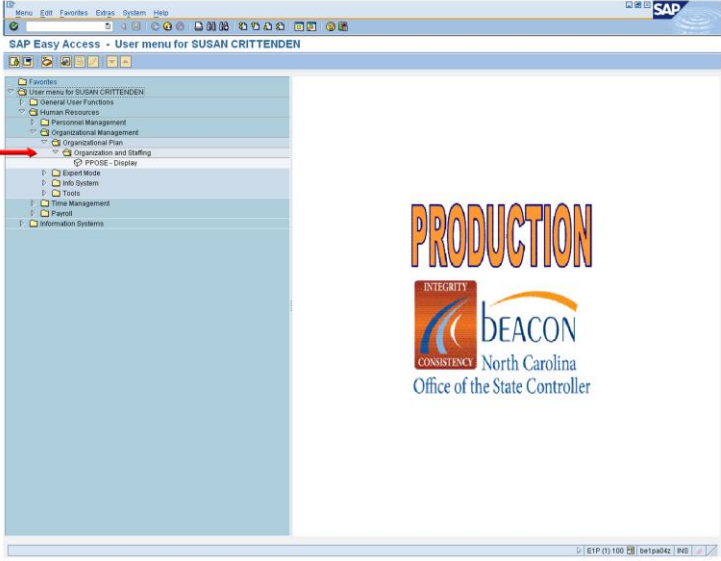
After completing this lesson, you should be able to display your agency's organizational structure using the Organization and Staffing Display, PPOSE, transaction.

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Notes

Notes

The transaction PPOSE – Organization and Staffing Display is used to review org units and positions in an organization. An organizational plan can be made with many object types, although these three basic object types are the building blocks:

- Org Units
- Positions
- Persons (Persons hold positions that are defined by jobs.)

Using PPOSE

- Organization and Staffing Display transaction can be used to view the existing organizational structure.
- Within Organization & Staffing Display, you can:
  - Display org units
  - Display positions
  - Identify "Chiefs"
  - Display holders of positions

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Notes

This transaction can be used to display the State's organizational structure and all the elements included in the structure, including org units, positions, jobs and people. You can also use this transaction to find a position number, which is required to complete personnel actions such as new hire.

You access Organizational & Staffing Display by one of the following methods:

- The Easy Access menu: *Human Resources > Organizational Management > Organizational Plan > Organization and Staffing > PPOSE Display*
- The shortcut T-code *PPOSE*

NOTE: T-code is an abbreviation for transaction code.

Instructor Demonstration

- Display Organizational Structure
  - Perform this transaction to display an organizational structure of org units, which represent the divisions, sections, work groups etc. in your agency or department.
  - Information:
    - Org Unit – Office of State Controller
    - Staff assignment
      - Chief position
      - Positions
        » Occupied
        » Vacant
      - Persons (Holders of positions)

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Notes

NOTE: To display the transaction codes in the menu structure, select the **Extras > Settings > Display technical names** menu option.

1. Select the menu path or type **PPOSE** in the command line of the SAP Easy Access screen and then press Enter.

2. In the **Find by** box, click on the nodes by "Organizational Unit" ▷ ☐ Organizational unit .

3. Click on **Structure Search**. This will display one or more org units in the bottom left box on the screen (depending on the org units with which you have authority to work).

4. Click on the nodes to find the org unit you desire to view.

   State of North Carolina ➔ Governor's Cabinet & Agencies ➔ State Controller ➔ Office of the State Controller

5. Double-click the selected org unit to display a list of positions assigned to the org unit. This structure will be displayed on the upper right side of the screen.

6. Click on the **Column Configuration** 📊 icon and then select additional information to be displayed for each position or holder.

7. Click on the nodes by any position title to view the employee assigned to the position.

Organization & Staffing Display Screen Layout

Left panel (A and B) is called "Object Manager"

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Notes

This transaction allows the user to display the existing organizational structure in a graphical view.

A - Search Area - The Search Area allows users to search for organizational information based on:

- Org Unit
- Position
- Job
- Person

B - Selection Area - The results of searches performed in the Search Area are displayed directly below the Selection Area. You can modify the search results by sorting or filtering. You can add and delete columns to easily find the object. Once the user selects an item from the Selection Area, the results are displayed in the Overview and Details Area.

The left panel (A and B) is called the *Object Manager*. You can hide the Object Manager by using the menu Settings > Hide Object Manager option; however, in OM you will probably find it more useful to keep the Object Manager visible.

Organization & Staffing Display Screen Layout (con't)

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C - Overview Area - The Overview Area lists the:

- Organizational Structure
- Code
- Key
- Relationship
- Chief position
- Valid from, Valid to
- Assigned to
- Assigned until

When the user selects items on the Overview Area, for example, selecting an org unit, the details for that selection display directly below the Overview Area in the Details Area.

D - Details Area - The Details Area lists the:

- Basic Data
- Account Assignment
- Cost Distribution
- Plan quota

The Details Area displays more information about the object selected in the Overview Area. The name of the tab changes depending on the object type highlighted in the Overview Area.

Performing Class Exercises (1 of 2)

After you logon to SAP, use the icons on your taskbar to move back and forth between the Training Center presentation and SAP.

Close all others

Leave but do not use

Task Bar

Toggle between Training Center and SAP icons

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Notes

To perform exercises in a virtual class, you will navigate back and forth between the SAP application and the Webex Training Center. You will close some of the icons that appear on your taskbar to make it less confusing about which icons to use.

Look at the bottom of your screen now and you should see two icons:

- State of NC- Office of Controller WebEx
- Training Center

You will leave both of these open during the course. If you have other applications open, you should close them now.

Click the green check to let the Instructor know you see these two icons on your taskbar.

Performing Class Exercises (2 of 2)

- After you complete a virtual class exercise in OSC HR/Payroll:

    – Access the Training Center from your taskbar
    – In the Participant's panel, click the **green check** icon

    – Leave the green check active – the instructor will clear it

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Notes

By using the green check to indicate you have completed an exercise, the instructor can see at a glance those students who may need additional time.

Exercise 3.1

Log onto SAP:

1. Use the task bar to open a new internet window.
2. Access SAP with your own user id and password.
3. Click the training GUI.
4. Click Training Sandbox E1T 899. The Easy Access screen appears.
5. On the taskbar, **leave open** the **Training Center, SAP Easy Access** and **State of NC** icons; close all other icons.
6. Click the Training Center icon on your taskbar to return to the Training Center.
7. Use the **Green Check** icon to let the Instructor know you have successfully logged on. The Instructor will remove the check.

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Notes

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1. Type **PPOSE** in the Command field on the Easy Access screen and click or press Enter.
2. At the Organization and Staffing Display, select the **Organization Unit** node.
3. Select **Structure Search** in the Search Area.
4. Click the node for the **State of North Carolina** in the Selection Area.
5. Click the node for the **Governor's Cabinet & Agencies**.
6. Click the node for the **State Controller**.
7. Double-click the **Office of the State Controller**.

   Questions:
   a) What is the org unit number of the State Controller?
   b) How many org units report directly to the Office of the State Controller's org unit?
   c) How many positions report directly to the Office of the State Controller ?
   d) What is the title of the position that manages the Office of the State Controller org unit? How do you know?
   e) If you want to see the org units that report to the Commerce org unit, how would you do that?

8. Ensure that you have selected the top line. Use the **Collapse icon** in the <u>Overview</u> section to close all of the org units.
9. Ensure that you have selected the top line. Use the **Collapse icon** in the <u>Selection</u> section to collapse all of the org units.

Instructor Demonstration

Display Org Unit Details
- Perform this transaction to display the master data details for an org unit.
- Information:
  - Org Unit – Office of the State Controller
    - OSC Statewide Accounting
      » OSC STWD ACCT Risk Mitigation Section

NOTE: The details are different for each OM object (org unit, position, and job).

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Notes

In a moment your instructor will demonstrate how to display the details for an org unit. Please refer to the next three pages of your student guide and follow along while your instructor demonstrates and explains each tab.

Org Unit Conventions

Short Description

Staff Assignments (Structure)	Code	ID
▷ 👤 Executive Assistant	100000000026	S 60089890
👤 BEACON Training Lead Contractor	Contractor	S 65000037
👤 Fiscal Research Staff Member	Contractor	S 65000503
👤 Fiscal Research Staff Member	Contractor	S 65000504
👤 BEACON Principal Fiscal Analy Contractor	Contractor	S 65000512
👤 BEACON Principal Fiscal Analy Contractor	Contractor	S 65000631
▷ 👤 Administrative Support Associate	000000000301	S 60087172
▷ ☐ OSC BEACON	501000000000	O 20000082
▷ ☐ OSC BEST Shared Services	501100000000	O 20000087
▷ ☐ OSC Business Services	500100000000	O 20010634
▷ ☐ OSC Financial Systems	500800000000	O 20010637
▽ ☐ OSC Statewide Accounting	500900000000	O 20010642
▷ 👤 Assistant State Controller	900000000096	S 60087144
▷ ☐ OSC STWD ACCT Central Compliance	500901000000	O 20010643
▷ ☐ OSC STWD ACCT Accounting & Fin Rprtng	500902000000	O 20010645
▷ ☐ OSC STWD ACCT Fin Research/Analysis	500903000000	O 20010646
▽ ☐ OSC STWD ACCT Risk Mitigation	500904000000	O 20013607
▷ 👤 Osc Risk Mitigation Manager	900000000004	S 60090516
▷ 👤 State Management Analyst	900000000007	S 60090517
▷ 👤 State Management Analyst	900000000008	S 60090518
👤 State Management Analyst	900000000009	S 60090519
👤 State Management Analyst	900000000022	S 60090520
▷ ☐ OSC Electronic Commerce	502000000000	O 20011637

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Notes

The object type for an org unit is "O".

The numeric object ID for an org unit will begin with the number 2.

The twelve-digit code, also referred to as the abbreviation, short-text, or number, is logically assigned by the agency. The first two digits identify the agency in PMIS.

The forty-character description for the org unit is "smart coded" to facilitate your data searching and reporting. The description will start with the description of its superior (parent) org unit. For example, the Statewide Accounting Division of the State Controller's Office org unit description is O*SC STWD ACCT.* This description includes the description of its parent org by using "OSC" to denote State Controller's Office. The org unit description is *OSC STWD ACCT Risk Mitigation*. This description includes the two superior org units in its description by using "OSC STWD ACCT" to denote both the State Controller's Office and the Statewide Accounting Division org units.

Numbering Conventions

Org Units: 20000000 to 29999999

Positions: 60000000 to 69999999

Jobs: 30000000 to 39999999

NOTE: Jobs are not displayed in the org structure on PPOSE.

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Notes

Characteristics for each org unit are stored on tabs in the *Details* section of the *Organization and Staffing Display* screen. Some characteristics of org units are inherited by subordinate org units and positions if they have not been maintained. SAP is using these tabs to define org units:

- Basic data
- Account assignment
- Work schedule

The remaining tabs are not used.

Org Unit Details (Basic data tab)

Slide 53
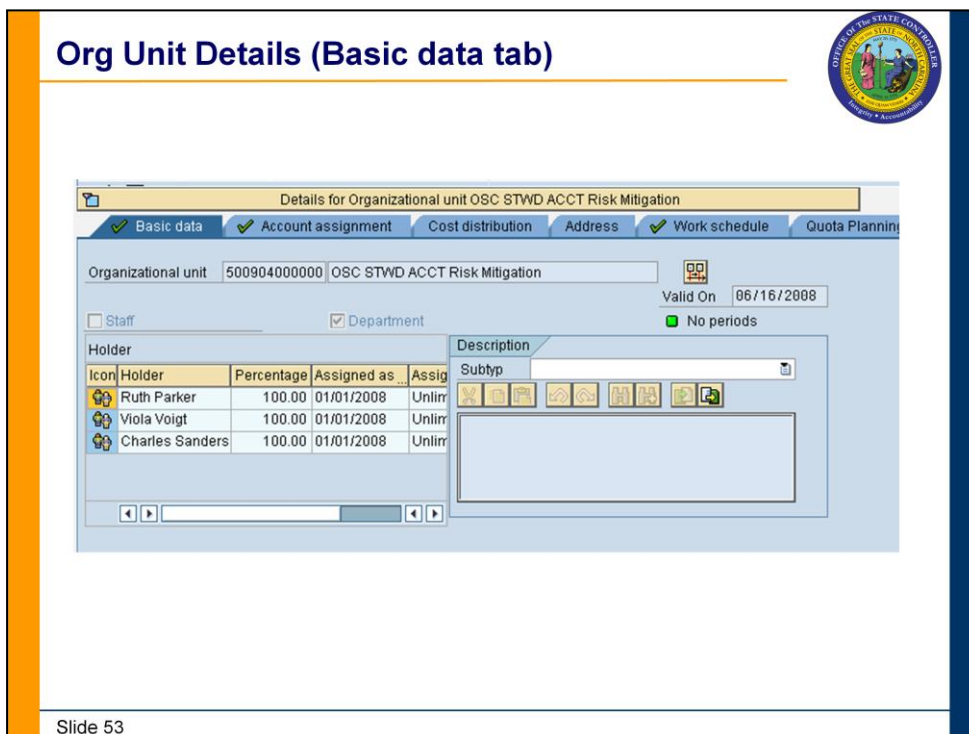
Notes

The *Basic data* tab provides org units with a unique identity. In the two *Org Unit* fields, the short and long description for the org unit are displayed. These descriptions are displayed in the organizational structure. The Department indicator is checked for all org units to enable payroll accounting. The employees that hold positions are also displayed in the *Holder* table.

Notes

The *Account assignment* tab specifies the controlling area, master cost center, company code, business area, personnel area and personnel subarea for an org unit. The data is also used as default values in *Personnel Administration*.

Data is inherited by subordinate positions and org units, as long as they have no direct assignment of their own. Inheritance occurs as follows:

- Account assignment features are inherited by subordinate org units and positions if they have not been maintained.
- If account assignment features have been specified for a superior org unit, these are overwritten by entries on the *Account Assignment* tab page for a subordinate org unit.

Org Unit Details (Work Schedule tab)

Details for Organizational unit OSC STWD ACCT Risk Mitigation

Basic data | Account assignment | Cost distribution | Address | Work schedule | Quota Plann

Work Schedule Grp   All work schedule groups

Valid On   06/16/2008

Work schedule   40.00   Hours of weekly working time
Origin   Organizational unit OSC STWD ACCT Risk Mitigation

No periods

Percentage   100.00 % of Organizational unit OSC Statewide Accou

General work schedule

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Notes

The *Work schedule* tab assigns 40 hours as the default general working time for the unit itself and for all objects under it in the organizational structure. The general working time is assigned to all subordinate org units, positions or employee groups if they have no individual working time assignment. Individual working time assignments of subordinate objects override the work schedules they inherit from superior org units. If all positions assigned to an org unit have a different work schedule, then you can change the org unit's work schedule and all positions will then inherit the value.

3.3 - Exercise

- **Display Org Unit Details**
    - In this exercise, you are the HR manager at the Office of the State Controller. The Risk Mitigation org unit was recently created and assigned to the Statewide Accounting Division org unit. The Assistant State Controller has asked you to review the details of the org unit to ensure accuracy. She wants you to check the agency organizational structure to verify that Viola Voigt and Charles Sanders are the holders of State Management Analyst positions.

Instructions -

Hint: You are looking for the OSC STWD ACCT Risk Mitigation org unit that reports directly to *OSC Statewide Accounting*.

Using the steps you learned in exercise 3.2, find the appropriate org unit and answer the questions listed below in the Notes section.

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Notes

Find and select the appropriate org unit.

Questions:

1. Who are the holders of the State Management Analyst positions?

2. In addition to looking in the Overview section, what other section displays holder information and how is it displayed?

3. What position does Ruth Parker hold?

4. Identify the holders of the other State Management Analyst positions.

5. How would you find the work schedule for the org unit? What are the work schedule hours?

* Ensure the top line is selected. Use the Collapse icon in the Overview section to close all of the org units.

* Ensure the top line is selected. Use the Collapse icon in the Selection section to close all of the org units.

Instructor Demonstration

Display Position and Person Details

- Perform this transaction to display the master data details for an org unit , position, and person.
- Information:
  - Org unit – OSC STWD ACCT Risk Mitigation
    - OSC Risk Mitigation Manager
      » Ruth Parker

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Notes

In a moment your instructor will demonstrate how to display the details for a position and a person. Please refer to the next ten pages of your student guide and follow along while your instructor demonstrates and explains each tab.

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Notes

Position conventions

The object type for a position is "S".

The object ID number begins with the number six (6).

Position details

Characteristics for each position are stored on tabs in the *Details* section of the *Organization and Staffing Display* screen. Some characteristics of positions are inherited from org units and jobs. SAP is using these tabs to define positions:

- Basic data
- Cost Distribution
- Address
- Work schedule
- If applicable, "Comp" tabs when the position is eligible for compensation for overtime, holiday, shift differential, on-call pay, etc.
- Ref Position Number
- SOC/County Code
- Position Type

The *Basic data* tab contains the position name, job information, chief position indicator (to signify if the position is the head of the org unit), and vacancy information.

Notes

The *Account Assignment* tab identifies the Personnel Area and Personnel Subarea and also identifies cost objects associated with the org unit.

Notes

The *Cost Distribution* tab shows how the position costing is set up to be distributed. This is where you look to see if a position is split funded, denoted by two rows in the table, as shown in the following graphic.

Position Details – Work schedule tab

Details for Position Osc Risk Mitigation Manager

✓ Basic data ✓ Account assignment ✓ Cost distribution ✓ Address ✓ Work schedule ✓

Employee group/subgroup

| Employee group | SPA Employees |
| Employee subgroup | A1 FT N-FLSAOT Perm |

Valid On 06/16/2008
🟩 No periods

Work schedule

Origin	Position Osc Risk Mitigation Manager
Working time	40.00 Hours of weekly working time
Approval	100.00 % of Organizational unit OSC STWD ACCT Risk

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Notes

The *Work schedule* tab identifies the Employee Group and Employee Subgroup and the work schedule for the selected position.

Position Details – Other tabs

- The *Address* tab contains the main address, the mailing address, and a courier address for the position.
- "Comp" tabs - If a position is eligible for additional compensation such overtime compensation, holiday payout period, night shift premium, evening shift premium, weekend shift premium, holiday premium rate, on-call pay, and callback pay.
- The *Reference Position Number* tab stores the PMIS position number. This tab also stores a reference to an abolished position when the position was created to replace an existing position.
- The *Position Types* tab will indicate if the position is classified as emergency, essential, or key.

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Notes

Knowledge check:

Why is the reference position number field blank?

Details for Position Accountant II

| Address | Work schedule | OT Comp Time | Holiday Comp Payout | Job Index | Tasks |

Valid from 08/15/2007
To 12/31/9999

PMIS Position Number
Reference Pos Number 0

Position Details – SOC/County Code tab

Details for Position Accountant II

OT Comp Time | Holiday Comp Payout | Job Index | Tasks | Ref Position Number | SOC / County Code

Valid from 07/01/2007
To 12/31/9999

SOC Code 132010
County Code 092 Wake

NOTE: This example reflects a different position – Accountant II

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Notes

The data displayed on the *SOC/County Code* tab is inherited from the job. The SOC code is used for EEO reporting by OSP. For graded positions, SAP will automatically assign the number. For banded positions, you will be prompted to select the number.

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Notes

Use the steps you learned in the previous exercises and find the appropriate org unit. Answer the following questions.

Questions:

1. Is the OSC Risk Mitigation Manager position a newly created position? How do you know?

2. What is the funding source for this position?

3. Who occupies this position?

4. How is the position work schedule assigned? How do you know this information? Could it have been different on this position from the default? If yes, why?

5. What should the *staffing status* indicate? Where did you find this information?

6. What Personnel Area is assigned to the OSC STWD ACCT Risk Mitigation org unit? How did you find this information?

7. Look at the State Management Analyst position **60090519**. Why does this position have a work schedule if it is vacant?

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Notes

Person conventions

The object type for a person (employee) is "P".

The object ID number is generated by the Retirement System.

Position details

Characteristics for each person are displayed on the *Basic data* tab. This tab shows the job assigned to the position which is held by the employee.

Person Details

Details for Person Ruth Parker

Basic data | Qualification | Tasks

Position assignment 06/16/2008

Icon	Existence	Position	Job	Organizational
		Osc Risk Mitigation Manager	Osc Risk Mitigation Manager	OSC STWD A

Valid On 06/16/2008
No periods

Personnel No 80000017   Name   Ruth Parker
EEGroup A   SPA Employees   PersA 1401 State Controller
EESubgroup A1   FT N-FLSAOT Perm   Statu   Active

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Notes

Click the Print button on the Overview Area's toolbar to see a print preview of the structure that you have selected.

Lesson Review

In this lesson you learned how to display your agency's organizational structure using the Organization and Staffing Display, PPOSE, transaction.

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Notes

Knowledge Check – Lesson 3

Terms	Definitions
	The highest org unit of financial accounting (NC01)
	Defines a specific agency within the State
	The position responsible for managing transactions within an org unit
	Employees - persons are assigned directly to positions which are described by jobs and assigned to an org unit
	Represent any type of organizational entity found in the State and are assigned to cost objects
	Provides a general classification of tasks that are routinely performed together and is used to describe several positions.
	Described by a job and related to an org unit. As a general rule may be held by one person
	A description of the employee's position in the State.
	Provides legal and reporting requirements, including the Company Code, Personnel Area, Personnel Subarea, and Cost Center
	Defines the hierarchical relationship between organizational management objects including org units, jobs, and positions

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Notes

Match the following terms to the definitions listed in this slide.

1. Chief Position
2. Company Code
3. Enterprise Structure
4. Job
5. Org unit
6. Organizational Structure
7. Person or Holder
8. Personnel Area
9. Personnel Structure
10. Position

Course Map – Organizational Management Overview

Lesson 1: PA Overview

Lesson 2: OM Concepts

Lesson 3: Displaying the Organizational Structure

Lesson 4: OM Processes and Reports

Lesson 5: Course Review

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Notes

Lesson Objectives

After completing this lesson, you should be able to:

- Identify key user roles and business process partners
- Identify OM reports

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Notes

High-level Overview of OM Processes (1 of 4)

Activity	Agency and Department HR	BEST Shared Services
Organizational processing includes adding, changing, or deleting (delimiting) an org unit.	Submits the approved *Organization Request* form to BEST Shared Services via postal mail, fax, or email.	BEST Rep – Verifies form is legible, from an authorized person, and follows other basic guidelines. Processing and Transactions – Creates, changes or delimits org units in SAP.

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Notes

NOTE: Org units are not currently captured in PMIS.

High-level Overview of OM Processes (2 of 4)

Activity	OSP	BEST Shared Services
Job Processing, includes creating, changing, deleting (delimiting) jobs, branches, and families.	Completes the *Job Request* form. Once all approvals have been obtained, submits form to BEST Shared Services via postal mail, fax, or email.	BEST Rep – Verifies form is legible, from an authorized person, and follows other basic guidelines. Processing and Transactions – Creates, changes or delimits job, branch, and family in SAP.

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Notes

Job Processing

The Office of State Personnel is generally responsible for establishing, revising and maintaining the Classification Plan. For each class established by the State Personnel commission, a class standard is prepared. Standards may be written in several forms. The most frequently used are specifications and benchmarks. In SAP these classifications are referred to as "Jobs".

Jobs are used to describe the duties and responsibilities of positions and serve as descriptions that apply to several positions with similar tasks or characteristics. When a new position is created, it can be related to a *job* that already exists in the SAP system. The position will then automatically inherit the characteristics of the *job*. This relationship will make it easier to create positions that are similar or the same, as it will not be necessary to assign characteristics to each individual position.

High-level Overview of OM Processes (3 of 4)

Activity	Agency and Department HR	Approvers	BEST SS
Position Processing	• Agency HR professional initiates action • OM Position Requestor processes position action in planned status in SAP • OM Position Requestor initiates workflow approvals	If required the following approvals occur • Agency Salary Control Officer (Agency Position Funding Approver) approves the actions after entering the cost distribution and position salary or rejects the actions. • If needed, the OSBM Position Funding HR approves or rejects position action. (This is necessary for all new positions and reestablished positions.) • If needed, the OSP Position approver approves or rejects position action. • Agency Position approver approves or rejects the position action.	BEST Rep – Upon final approval notified by Workflow converts position action to active status in the SAP system. **NOTE**: SAP will automatically send a record of the action to the Salary Control System for necessary updates and reporting.

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Notes

High-level Overview of OM Processes (4 of 4)

Activity	Agency and Department HR	BEST Shared Services
Position Vacancy Posting process.	Provide paper document on position vacancy posting to BEST Shared Services	Post position vacancies for small agencies
Legislative Increases		SAP Production Support team will process requests
Mass edit of budgeted positions		SAP Production Support team will process requests
Work Against		SAP Production Support team will process requests

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Notes

Position Actions (1 of 2)

Action	Reason	Remarks
Fund/ New Position Re-Establish Position		Fund Position and New Position (Establish Position) are being combined into one action.
Reallocation Action	•Reallocate – Up •Reallocate – Down •Reallocate – Horizontal •Adjustment from Auth •Reallocate – Differential •Remove Differential	A Reallocation is a change in the job classification of a position. The position salary might also change on a reallocation.
Position Abolished		Delimit the position.
Position Transfer		Position transfer is the movement of a position from one org unit to another.

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Notes

Position Actions (2 of 2)

Action	Reason	Remarks
Position Hours Change		This is a change in the hours of a part-time, less than 40 hours per week, position.
Position Type Change	FLSA change Position Type EPA to SPA SPA to EPA Full-Time to Part-Time Part-Time to Full-Time	This is a change in the employee group and employee subgroup that may also change the position from full-time to part-time and vice versa. It may involve a change from time-limited to permanent or from FLSA subject to FLSA non-subject.
County change		You will update county code on IT9022 (**NOTE**: Often the funding changes when the county changes).
Title change		Maintain position title.
Reporting change		Change the relationship (A012) to reflect the new supervisor.

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Notes

New Position Workflow Process

Agency HR Professional Initiates Action

Position is created in Planned Status in SAP

Salary Control Officer Reviews/Approves (Funding Information Is Entered)

OSBM Review/Approval

Agency HR Approval (s)

OSP Approval (as needed)

Processing completed by BEST Shared Services
Position is now Active in SAP

Record of the Action Is Provided to Salary Control System via Interface

NOTE:
If at any point in the process, the action is rejected, Salary Control is not affected and the position status will be changed to "rejected" in SAP

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Notes

1. An agency HR professional initiates a request for a new position (Fund and establish position are combined).

   - Position number is created.
   - Job class, title, grade, and org unit are provided.

2. The request is routed to Agency Salary Control Officer, who enters the cost distribution and position salary. The Salary Control Officer then approves or rejects the action.

3. The request is routed to OSBM for approval.

4. The request is routed for all required HR approvals.

5. Upon final approval, the action is active in the SAP system.

6. A record of the action is provided to the Salary Control System for necessary updates and reporting.

OSC HR/Payroll Reporting Solutions

- OM reports that are standard SAP reports are available in SAP ERP system
- OM reports that are customized are available in SAP Business Intelligence (BI) system

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Notes

SUMMARY OF BUSINESS RULES

Users can generate reports in SAP based on their *SAP user profile* and *SAP (security) authorizations* also referred to as HR security roles or process roles. Some data is protected from view by authorizations, such as salary data, meaning that only users who are allowed to see that specific data will be able to access it.

You will have the opportunity to learn more about navigating in BI by completing the BI Reporting, BC120, online course.

OM Reports for Jobs in SAP ERP (1 of 3)

SAP Transaction Code	Report Group	Report Title
S_AHR_61016497	Job	Existing Jobs
S_AHR_61016491	Job	Existing Org Units
S_AHR_61016498	Job	Job index
S_AHR_61016495	Job	Org. Structure with Persons
S_AHR_61016494	Job	Org. Structure with Positions
S_AHR_61016493	Job	Organizational Structure
S_AHR_61016492	Job	Staff Functions for Org. Unit

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Notes

This slide lists the standard SAP reports for jobs.

Refer to the *OM Reports available in SAP ERP* job aid for more information about each report.

OM Reports for Positions in SAP ERP (2 of 3)

SAP Transaction Code	Report Group	Report Title
S_AHR_61016502	Position	Existing Positions
S_AHR_61018831	Position	Obsolete Positions
S_AHR_61018869	Position	Periods of unoccupied positions
S_AHR_61016513	Position	Reporting Structure with Persons
S_AHR_61016512	Position	Reporting Structure Without Persons
S_AHR_61016503	Position	Staff assignments
S_AHR_61016505	Position	Task Description for Positions
S_AHR_61016509	Position	Vacant/Obsolete Positions

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Notes

This slide lists the standard SAP reports for positions.

Refer to the *OM Reports available in SAP ERP* job aid for more information about each report.

General OM Reports in SAP ERP (3 of 3)

SAP Transaction Code	Report Group	Report Title
S_AHR_61016528	General	Structure Display
S_AHR_61016531	General	Display Infotypes
S_AHR_61016532	General	Infotype Reporting

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Notes

This slide lists the general standard SAP reports.

Refer to the *OM Reports available in SAP ERP* job aid for more information about each report.

Demonstration

Execute the *Job Index* report (S_AHR_61016498)

- Your agency Deputy Director has asked you to run the *Job Index* report to identify all positions attached to the Driver Education Field Supervisor job.

  – INFORMATION (most often required):
    - Job Search – "Driver Ed*"

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Execute the Job Index report

Menu path:

Human Resources > Organizational Mgmt > Info System > Job > S_AHR_61016498 Job Index

The instructor will run the S_AHR_61016498 – Job Index report to identify all positions attached to a particular job. The instructor will also demonstrate how to export the report to Microsoft Excel using the **List > Export > Spreadsheet** menu option.

Exercise 4.1

Execute the *Job Index* report (S_AHR_61016498)

- Your agency Deputy Director has asked you to run the *Job Index* report to identify all positions attached to the Driver Education Field Supervisor job.

  – INFORMATION (most often required):
    - Job Search – "Driver Ed*".

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Notes

Use the menu path to run the S_AHR_61016498 – Job Index report to identify all positions attached to a particular job. Export the report to Microsoft Excel using the **List > Export > Spreadsheet** menu option.

Human Resources > Organizational Mgmt > Info System > Job > S_AHR_61016498 Job Index

OM Reports in BI (1 of 2)

B0117	Active Position Counts
B0126	Dashboard: Vacancy Rate
B0029	EEO Planning by Org Structure
B0165	Job Attributes
B0055	Labor Force Trends
B0056	Lapsed Salary
B0063	Legislative Increase by Position
B0070	On-Call Eligibility List
B0071	Organizational Hierarchy
B0077	Position Attributes
B0078	Position Attributes – Dates for Hiring
B0113	Position Changes by Period
B0118	Position Counts Over Time
B0149	Positions by Funding Source

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Notes

In addition to the standard SAP reports, custom reports will be accessible using the BI reporting tool.

Refer to the *OM Reports available in BI* job aid for more information about each planned report.

OM Reports in BI (2 of 2)

B0076	Senate Bill 222 IT Expenditures Report (planned personnel expense by cost center)
B0096	Supervisor/Employee Relationships
B0169	Vacancy History (Last 12 Months)
B0168	Vacancy Postings
B0104	Vacancy Report

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Notes

You will learn how to use the BI reporting tool in the *Reporting Overview and Navigation*, BC120, course.

Refer to the *OM Reports available in BI* job aid for more information about each report.

Lesson Review

In this lesson, you learned to:

- Identify key user roles and business process partners
- Identify what is changing
- Identify OM reports

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Notes

Knowledge Check Poll Review Final

– Use the Polling section of your computer to answer the questions

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Notes

1. An agency or department are both examples of which object within the organizational structure.

2. Position numbers are assigned sequentially in OSC HR/Payroll and therefore have no specific meaning to the number assigned.
   - ○ a. True
   - ○ b. False

3. A position designated as Chief manages the organizational unit and any subordinate org units.
   - ○ a. True
   - ○ b. False

4. Enter the percentage value that should always display on infotype 0001 – Organizational Assignment.

5. Enter the transaction code that is used to display the Organizational and Staffing Screen.

Course Map – Organizational Management Overview

Lesson 1: PA Overview

Lesson 2: OM Concepts

Lesson 3: Displaying the Organizational Structure

Lesson 4: OM Processes and Reports

Lesson 5: Course Review

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Notes

Course Review

- In this course you learned to:

    - Define Organizational Management (OM)
    - Identify components of the OM structure
    - Display the organizational structure in SAP for your agency/department
    - Identify OM reports

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Notes

Notes

Next Steps

- Monitor BEACON communication
  - BEST Shared Services web site (especially the Updates tab)
  - URL: http://www.osc.nc.gov/BEST/index.html
- Review conceptual materials
- Access BEACON Help
  - Access from an SAP transaction
  - URL: http://help.mybeacon.nc.gov/beaconhelp
- Practice what you've learned
  - URL: https://mybeacon.nc.gov
  - Client 899
  - Use your current NCID user name and password

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Notes

Continue to monitor updates on the BEACON University website for information regarding any future training that you are scheduled to attend.

Keep your training materials close by as a ready reference.

Want to practice what you have learned from your desk?

- Follow the link provided above to access the training client on the BEACON website. The training client is number 899. Your current NCID user name and password are used to access the practice environment.

Need transactional assistance after go live?

- Remember to access BEACON help when you need assistance in completing transactions. As stated above, the work instructions can be accessed either on line or by clicking on BEACON help from within an SAP transaction.

Notes

1. Open a new internet browser and type the url:

    http://rod.sumtotalsystems.com/beacon

2. At the Log On screen, enter your full email address and password. If you cannot log into LMS, unmute your telephone and let the instructor know. The instructor can reset your password if you have forgotten it.

3. Click **Logon**.
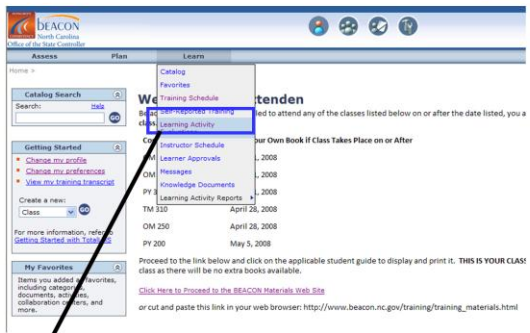
4. On the blue horizontal bar near the top of your screen, click **Learn**, and then click **Learning Activity Evaluations**.

5. Locate the evaluation that corresponds to the class you've just completed and click the **Start** button to launch it.

6. Complete the evaluation.

7. Click the Training Center icon and then click the green check to let the instructor know you have completed the evaluation.

If you cannot log in to the LMS, please unmute your telephone and let the instructor know. He or she can reset your password.

Thank you for attending and participating in the virtual classroom session of this course.
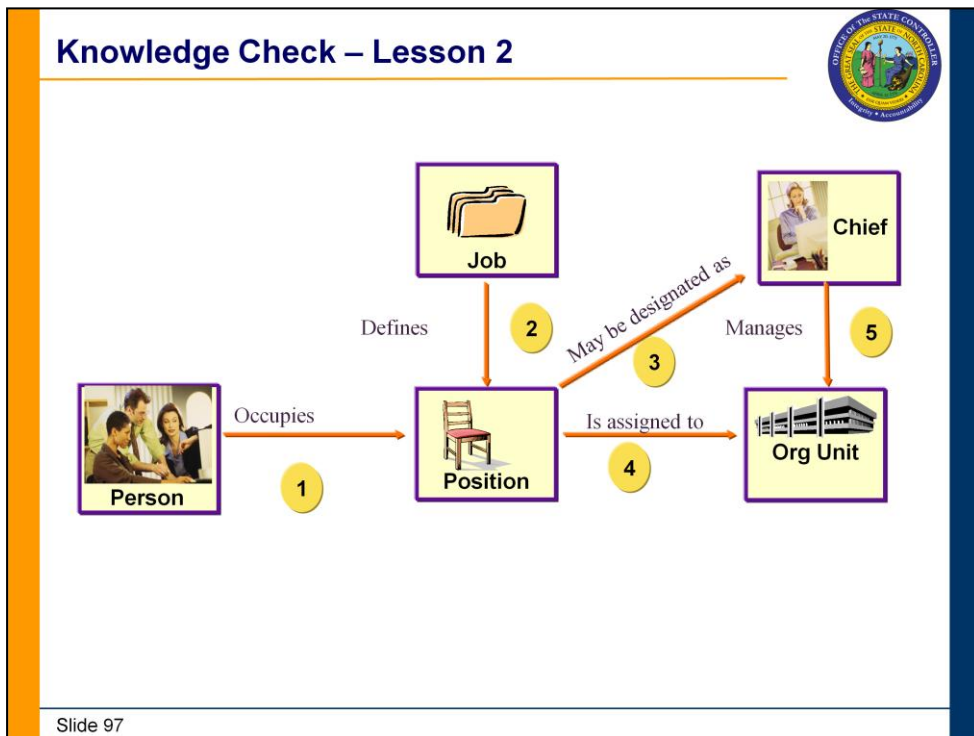
Notes

Knowledge Check – Lesson 1

T	F	Question
	F	1. The Employee Subgroup arranges employees by their type of status, and establishes business rules for calculating leave.
	F	2. The Employee Group defines more detailed and specific processing for payroll calculation rules, for example, if employee is subject or not subject to FLSA.
T		3. The Payroll area describes the pay frequency and payroll cycle for each employee.
T		4. The company code is the highest level of the company structure as defined by Finance.
	F	5. The Personnel Area further defines employees in order to identify various working schedules so that Time Management can define groups of specific time entry rules.
	F	6. The Personnel Subarea is used to identify the specific agency for whom the employee works.

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Answers

1. A person **occupies** (holds) a position.
2. A job **defines** a position.
3. A position **may be designated as** chief. In other words, a chief is also a position.
4. A positions **is assigned to** an org unit
5. A chief **manages** an org unit

Knowledge Check – Lesson 3

Terms	Definitions
2 - Company Code	The highest org unit of financial accounting (NC01)
8 - Personnel Area	Defines a specific agency within the State
1 - Chief Position	The position responsible for managing transactions within an org unit
7 - Person or Holder	Employees - persons are assigned directly to positions which are described by jobs and assigned to an org unit
5 - Org Unit	Represent any type of organizational entity found in the State and are assigned to cost objects
4 – Job	Provides a general classification of tasks that are routinely performed together and is used to describe several positions.
10 – Position	Described by a job and related to an org unit. May be held by one person or many people
9 - Personnel Structure	A description of the employee's position in the State.
3 - Enterprise Structure	Provides legal and reporting requirements, including the Company Code, Personnel Area, Personnel Subarea, and Cost Center
6 - Organizational Structure	Defines the hierarchical relationship between organizational management objects including org units, jobs, and positions

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